INVESMART NATIONAL PARTICIPANT SERVICES CENTER

We are pleased to introduce our National Participant Services Center to you and to your employees. All participants in your retirement plan now have access to our National Call Center to assist them with questions related to their plan.

To speak to a representative,

1. Please call 1-800-370-9601
2. Press 1 for English;
3. Input USERID (SSN), and press #;
4. Input Password (PIN), and press #;
5. Press 0 to speak to a Representative

If you do not know your password, press # after inputting USERID, press # again, and press 3 to speak to a Representative. All calls are digitally recorded.

Hours of Operation (Monday – Friday)	Eastern	8 am – 8 pm
	Central	7 am – 7 pm
	Pacific	5 am – 5 pm

Below list some of the features that are available to your participants from our National Participant Services Center:

- *Spanish-Speaking Representatives*
- *Website Information*
  - *Explain how to use various web functions*
  - *Assist with to access difficulties (password, entry, speed)*
  - *Respond to web security questions*
- *Questions on Account Balance Information*
  - *Assist with Account Balance by funds / Accounts / NAV / Shares*
  - *Assist with changing PIN/Password*
  - *Assist with changing mailing address (if you are currently providing addresses on payroll)*
  - *Assist with verifying or changing your email address*
  - *Question on demographics DOB, DOH, DOP*
- *Plan Provisions*
  - *Access Plan Provision Summaries*

- *Assist with Transfer Request:*
  - *Respond to questions on types of transfers and how to execute one*
  - *Assist with a Fund to fund transfer*
  - *Assist with a Model to Model transfer (if you have Model Fund)*
  - *Assist with a Rebalance entire account request*
  - *Explain change investment elections to rebalance allocation*
  - *Assist with request to cancel transfers*
  - *Respond to questions about status of transfer*
  - *Respond to questions about transfer results*

- *Questions on Withdrawal / Distributions / Loan (assuming that your plan has loan provision)*
  - *Respond to request for status of processing update*
  - *Respond to Loan/withdrawal eligibility questions*
  - *Assistance with forms (all types)*

- *Payroll Contributions*
  - *Status of contributions being processed*
  - *Contribution deposit date*
  - *Assistance with tracking contribution deposits.*

- *Transaction History*
  - *Respond to questions on Transaction History*